

Enterprise Project Management Office (EPMO) – its.epmo@its.nc.gov

What is in this issue

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How to Use Filters

EPMO Training for FY 08-09

Tool and process changes

EPMO Training

PMP Prep Class
October/November, email
jesus.lopez@its.nc.gov

FY 08-09 Various Project Management Training, TBD, email
barbara.swartz@its.nc.gov

Application Portfolio Management tool training, July-various dates, email
charles.richards@its.nc.gov

EPMO Team

Quality Assurance
Dick McGee
Shaw Erfani

Project Management Advisors
Alisa Cutler
Bob Giannuzzi
Jesus Lopez
Linda Lowe
Gaye Mays

Portfolio Management PPM tool and processes
Jim Tulenko
Charles Richards
Barbara Swartz

EPMO Director
Kathy Bromead

Please send feedback to
its.epmo@its.nc.gov

What's New? – PPM tool new user training is now available as a video presentation. This means you don't have to wait for a class to learn about the PPM tool. To access the video go to the PPM tool to Help link. Then select NC Help, Project Portfolio Management and Training Material.

Application Portfolio Management

Your project is completed, lessons learned created and you have closed all aspects of the project. What is next?

Why Application Portfolio Management?

When a project to develop or enhance an application is completed, then it is time to document the on-going support, maintenance and information about an application. The PPM tool has the ability to track applications.

When should application portfolio data be entered?

- 1) When an application project closes.
- 2) As applications change over their life cycle.
- 3) At least once a year in the June-August timeframe.

Who enters application portfolio information?

- 1) Agency Application manager
- 2) Agency CIO

3) Agency application team member assigned by CIO to complete this work

Required Upcoming Changes

- 1) Enter any new applications
- 2) Enter actual application costs for FY 2008
- 3) Update application roadmap to FY 2013
- 4) Enter application to application interfaces
- 5) Enter disaster recovery requirements

EPMO Improvement Plan

With the fiscal year coming to a close, the EPMO would like to thank you for your efforts to successfully manage IT projects in the State of NC. We have made some improvements this year and hope to work closely with our customers and continue adding to our portfolio and project management best practices.

The EPMO has developed an improvement plan for FY 08-09. It consists of improvements areas suggested by the customer survey and the EPMO audit done in 2007.

EPMO Improvement Areas

- 1) Improve communication to our customers.
- 2) Improve project management knowledge sharing.
- 3) Coordinate training to improve and grow project manager skills.
- 4) Identify and implement two EPMO processes that provide value to agencies.
- 5) Review tool and EPMO processes to improve project quality and reduce project risk.

6) Develop or improve metrics that effectively measure project success.

7) Coordinate the effort to improve and align RFP and contract processes.

We want your feedback. If any of these areas don't make sense or we missed something, please let us know. A detailed plan with benefits and specific action items will be provided and discussed at the next Project Management Advisory Meeting on July 21st.

Improvement Areas for Third Quarter

RFP/Contract process improvement

PPM tool upgrade

The Role of State Approvers

Every project \$100,000 or above is reviewed as part of the state approval process. The state approvers meet every Thursday afternoon as a team to discuss any project ready for an initial approval or a gate approval. Each state approver reviews the projects ahead of time and may contact agency project managers for clarifications before or even after the meeting. The PMA attends to provide information to reviewers when asked.

State Approvers

Kathy Bromead – EPMO

Jim Dolan – OSBM

Doug Banich – Enterprise Architecture and Security

Julie Batchelor – Office of the State Controller

Top PPM Tool Issue

Issues are closed prior to completion and not filled in completely. **Project Managers, please be diligent in reviewing and completing issues that are documented in the PPM tool.**

Important Links

EPMO Web Site

<<<http://www.epmo.scio.nc.gov/>>>

PPM Tool

<<<https://www.ppm.state.nc.us/UMTNC/Login.aspx?Path=%2fUMTNC%2fDefault.aspx>>>

The Change Request Process

Good project management practices anticipate and accommodate change. It is a normal part of the project management process to revise project budget, schedule or scope, as long as these three conditions are followed.

- 1) An established change management process.
- 2) A valid reason exists for the change.
- 3) Business sponsor approval of the change.

When to do a change request?

Projects \$500,000 and above must have a change request for budget changes > 5%. For scope or schedule changes, attach an agency approved change request document (e-mail, memo, change review board approval) to the Document Management tab.

In the case of projects less than \$500,000, no action is

required unless the total cost of the investment rises to \$500,000. When this happens, the project range in the PPM Tool must be updated, which sends the project back to Initiation. The project will then proceed through the normal process for a project over \$500,000.

What is the change request process? See this link

<<<http://www.epmo.scio.nc.gov/documents/ChangeRequestGuidelines.pdf>>>

How to Use Filters

What is a filter?

A filter is used in the PPM tool to limit the projects that are viewed. You may want to do this if you have a large portfolio of projects. A good example is you may only want to view or report on "active" projects.

Who can create a filter?

Any PPM tool user.

Where can I use a filter?

A filter used on the "Builder", "My Scorecard" or "Dashboard" views limit the projects to those in the filter list.

How do I create a filter?

We've created an instruction sheet which can be found at <<<http://www.scio.nc.gov/documents/docs/PortfolioManagementInitiative/NCHelp/How%20to%20Use%20Filters%20in%20the%20PPM%20Tool%20V3.pdf>>>

EPMO Training Coordination

For FY 08-09, the EPMO is coordinating four classes to improve project management skills. The classes are Project Estimating and Controlling,

Business Analyst Boot Camp, RFP Boot Camp, and Requirements Gathering. Based on the number of responses, these classes may be offered multiple times over the course of the

fiscal year. Sign up must be completed by the end of July. These courses are not free but should be less than individual off-site classes. Please email barbara.swartz@its.nc.gov for more information.

What's Changing

PPM Tool Strategy

Project Portfolio Server 2006 is a supported version of the PPM tool. We will be migrating to PPS 2006 this fall.

Process Changes

- 1) Agency Approved Business Requirements added as requirement to Gate 2 (execute and build) approval.

- 2) Sponsor approval that user acceptance criteria have been met added as a requirement for Gate 3 (implementation) approval.

- 3) Triple constraints (scope, cost and schedule) are now baselined at Gate 2 (execute and build) approval.

Documentation Changes

- 1) Added Change Request Guidelines

- 2) Updated roles/responsibilities matrix

- 3) Updated gate checklists

- 4) Added Workflow for projects < \$500,000

- 5) Improved RACI chart

Tool Changes

- 1) Remove "procurement", "implementation and "closeout" from type of project.